

# School Appointment, Website Set-Up, Notes and Referral Form

Contact or meet with each School Fundraising Leader and then use this Form to write down (while you are on the phone or in person) the following information to set-up or edit their Website. Each School Team or Club will have their own individual Website (as well as every member of that Team or Club). One form is needed for each Team or Club. When you are ready, login to your Representative Website and set-up or edit the new Fundraising Account using the information you collected below.

**School/Contact:** \_\_\_\_\_ **Team or Club:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_ **Phone:** \_\_\_\_\_  
**Appointment Date & Time:** \_\_\_\_/\_\_\_\_/\_\_\_\_ **Website URL:** \_\_\_\_\_  
**Facebook Page:** \_\_\_\_\_ **Twitter Page:** \_\_\_\_\_

## Reasons for Raising Money

<input type="checkbox"/> Arts & Supply	<input type="checkbox"/> Events, Concerts	<input type="checkbox"/> General School Fund	<input type="checkbox"/> PTA/PTO Funds	<input type="checkbox"/> Team Equipment
<input type="checkbox"/> Banquets & Awards	<input type="checkbox"/> Field Trips & Travel	<input type="checkbox"/> Library Books & Tech	<input type="checkbox"/> Technology Equipment	<input type="checkbox"/> Team Travel
<input type="checkbox"/> Carnival & Events	<input type="checkbox"/> Building Maintenance	<input type="checkbox"/> Math & Science	<input type="checkbox"/> Sports Equipment	<input type="checkbox"/> Team Awards Banquet
<input type="checkbox"/> Classroom Parties	<input type="checkbox"/> General Equipment	<input type="checkbox"/> Playground Equipment	<input type="checkbox"/> Team General Fund	<input type="checkbox"/> Other _____

## School's Financial Information

**# of Students:** \_\_\_\_\_ **Financial Goal:** \$ \_\_\_\_\_ **Start Date of Fundraiser:** \_\_\_\_\_  
**Paypal E-mail Address:** \_\_\_\_\_ **Tax I.D. #:** \_\_\_\_\_

## School's Information

<b>Fundraising Leader:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Fundraising Leader:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Fundraising Student Leader:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Fundraising Student Leader:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Fundraising Student Leader:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____

**Notes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Other Referrals within the School

<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____

## Referrals at Different Schools or School Districts

<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____
<b>Referral Name/Group:</b> _____	<b>Phone:</b> _____	<b>Email:</b> _____